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ABSTRACT

This report describes how school librarians can master the art of grantsmanship by following three guiding principles. First, librarians are advised to begin by identifying their institution's goals and objectives and conducting a needs assessment. Second, it is important for the grant-seeker to understand the mission of the funding source (whether it is a corporation, foundation, or government agency), its goals and objectives, preference for projects to fund, and procedures for the submission and review of proposals. Thirdly, the library media specialist is advised to develop the proposal with the support and assistance of school district administrators. The guide then describes how to make an initial contact with the funding source and outlines the fundamental elements of a proposal. Guidelines for writing and submitting the formal proposal are also provided. The report concludes with a selected list of publications that contain information on potential funding sources; a sample project management chart; a sample project budget; and a glossary of grantsmanship terms. (15 references) (MAB)

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Grantsmanship

A Primer for School Librarians

by David L. Olson

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GRANTSMANSHIP: A primer for school librarians

by David L. Olson
University of Maine at Farmington

Writing in the June, 1987, issue of *School Library Journal*, Marilyn Miller and Barbara Moran analyze acquisitions trends in America's school libraries. It is not a rosy picture. Sadly, they conclude that "schools in this country are not investing enough money in their LMCs to keep current information coming into the school at a rate necessary for an up-to-date curriculum and for modern equipment, maintenance, and supplies in sufficient quantity to meet the expanding needs of students and teachers." In FY86/87, the national average for book purchases per pupil was just over $6.00 per year when book prices averaged $15-$25 per title, and increased in price by 7.7% from 1984 to 1985. **(Miller, 1987)** Two years later, the picture looks even worse. Miller reports in 1989 that total material expenditures per pupil averages under $14.00, not even enough to buy one book per pupil per year. **(Miller, 1989)** It is the exceptional LMC that has adequate funding for the maintenance of collections and services to meet standards, much less demonstrate excellence.

Yet many LMC's do manage to provide innovative programming, including high-tech information gathering skills, instructional video and television production, integrated library skills instruction, and multi-type library cooperation. In many cases, the funding for these programs is derived, partly or in whole, from grants.

Programs aimed at networking and multi-type library cooperation are becoming popular across the nation. School library media centers are often invited to take part in these networks, which are most often funded by federal and state grants, such as Title III of the Library Services and Construction Act (P.L. 84-597). LSCA grants are most often funneled through the State libraries to accomplish resource sharing among multi-type libraries.

Foundations, corporations, and even local businesses may be approached for funding, depending on the scope and needs of the project. It is important, then, that the LMC director have an understanding of the basic principles of grantsmanship and their application in writing successful proposals and professionally managing the grant-funded program.

If you have ever said to yourself, or a colleague, "If only we had the money to...", you are on your way toward writing a grant proposal. In fact, you have already passed the first hurdle, that of coming up with the idea.

Goals, objectives, and determination of needs

A statement of goals and objectives functions as a road map for the direction of the school library media center, where goals may be seen as the destination, and objectives the routes to get there. Following this analogy, needs may be seen as roadblocks on the path to progress toward stated goals. **(Boss, 1980)**

An LMC may have the goal of increasing access to existing and future collections by way of computer-generated cataloging products and perhaps a computer-based circulation system. The obvious need is appropriate software and adequate hardware to accomplish the goal.

Funding sources, too, have their goals and objectives. The XYZ Computer Corporation may have the goal of increasing visibility (and future sales) in the school library media center market by providing equipment or software to institutions in need. The library profits from the grant of equipment or software, while the corporation profits from publicity and future sales.

The art of grantsmanship, in short, is one of matching institutional goals and objectives to those of a potential funding source.

Although grantsmanship is often spoken of as an "art" — or rare talent — it is based on a few commonsense principles. The first, and perhaps most important of these principles is the honest appraisal of needs related to an important goal; that is, the goal is obtainable by planned objectives, the project will have a significant impact on the quality of services rendered, and the needs are well-documented and within the scope of the institutional and project goals and objectives.

The various funding sources — government agencies, private and public foundations, and corporate entities — receive many more requests than they can fund and grant reviewers are well-attuned to spotting vagueness in goals and objectives, or overstatement of need.

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Principle #1:

First, identify important goals and clearly-defined objectives, then assess needs. It is the strength of the idea, and the potential impact for the fund-raiser and the fund-giver, that succeeds.

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Types of funding sources

Potential funding sources fall into three broad categories: corporations, foundations, and government agencies. Of the three, government agency grants are probably most familiar to school librarians in the form of "block grants" (Federal funds dispersed by local and regional governments to broad areas of need, such as education or community development) or the more specifically library-oriented LSCA grants. The government also operates programs such as the National Endowment of the Arts, which are very similar to foundations.

In the case of government funding the availability of funds is often made known to school district and LMC administrators through RFPs (Requests for Proposals). Corporate and foundation grants, however, are a more elusive target.

Foundations are based on private or public funds which are invested and managed in such a way that income is made available to fund grants. Most foundations specialize in one or more areas of funding (e.g., education, science or medicine, community development) and may restrict their fund-giving to a specific part of the country, a certain minority group, or some other criteria. Private foundations may be of three types: independent, sometimes called "family foundations"; operating foundations (which give few external funds); and company-sponsored foundations. Public foundations, sometimes called "community foundations," usually restrict giving to their own urban area and receive their income from a variety of sources.

Corporations and businesses may have in place a company-sponsored foundation as a conduit through which to funnel funds. The Metropolitan Life Foundation funds health education programs, for instance. Many corporation provide funding for social and educational projects, among them: Burger King, Pizza Hut, Apple Computers, IBM, McDonald's, and General Electric, to name but a few. **(Saks, 1987)**

Identification of funding sources

Occasionally, a funding agency may circulate an RFP (Request for Proposal) to institutions that match its needs, or are on its mailing list. Most often, though, it is up to the grant requester to seek out potential funding sources. This would be a daunting task were it not for the fact that several good reference sources exist to aid in the search. Although a list of sources will be found in Appendix B, a few deserve special mention.

The Foundation Center, a national service organization, is the foremost distributor of information on private and public foundation funding. It publishes a number of grantsmanship tools, including *The Foundation Directory*, a list of foundations indexed by subject, geographic

area, and name. Foundation Center publications and services are available at larger public and academic libraries across the nation.

The Annual Register of Grant Support (a Marquis publication) is an excellent source of information on all types of funding — government, foundation, and corporate. It includes access by interest area and includes information on support awarded, amounts granted each year, maximum awards and durations of funding.

A highly useful source of information on corporations and foundations, once identified, is through their annual reports. Annual reports contain statements of the financial condition of the company or foundation, comments about the year's business and prospects for the future. Annual reports may often contain information on new trends in production, corporate or foundation goals, and the names of key personnel. Most corporations and foundations are happy to send copies of their reports. Addresses for corporations (as well as the names of key personnel) may be had from directories such as *Standard & Poor's Register*, *The Million Dollar Directory*, or *The Thomas Register*.

Sources of federal funding are available in the *Catalog of Federal Domestic Assistance*, and the *Federal Register*. Look for these in larger public and academic libraries.

Once potential funding sources are identified, it is essential to discover as much as possible about them, including names and addresses, application procedures, and a recent history of grants awarded. Periodical articles may also illuminate foundation or corporate plans, philosophies, and public images. It is this information that facilitates matching goals and objectives.

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Principle #2:

The primary sources of grant funding are government agencies, private and public foundations, and corporations. Each has its own mission, goals and objectives, preference for projects to fund, and procedures for submission and review of proposals. It may pay (quite literally) to know with whom you are dealing when submitting a proposal.

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Gathering support

Before responding to an RFP, or developing a proposal to present to a potential funding source, it is wise to seek the support and assistance of your school administration, as well as collegues who can assist you in preparing the proposal.

The support of school administration is vital to the success of a proposal. In many cases, a representative of the school board or the superintendent may be required to outline their support and sign off on the cover letter. This is especially the case if funding is approved only if the institution is willing to provide additional funds from its own budget, or other "in-kind" contributions.

> Attitudes of school administration towards the proposed program are very important. Will the school district administration—school board and superintendent—permit the school library media specialist to accept the funding if granted? The only thing worse than to develop a proposal and present it to the school board only to have it turned down is to develop a proposal, have it funded, and then have the school board refuse to accept the money. It is imperative that the school library media specialist involve school administration in the planning and development of any grant proposal to ensure that the proper approval will be granted at each step along the way.
> **(Woolls, 1986, p. 14)**

It is possible for one person to write a small grant proposal and manage its implementation. Projects, however, that require the cooperation of other agencies (multi-type library cooperation projects, for example), or ones that involve other members of the school or district staff and administration will require more planning.

It must be decided who will administer the grant if funded, who will control the budget and account for money spent, who will function in key roles over the life of the project. Résumés must be gathered and submitted with the proposal for all principal members of the grant team.

Once the groundwork is laid — the innovative idea perceived, the support gained of school staff and administration, research done on potential funding sources, and an outline of the proposal written — it is time to make the initial contact with the funding source, or sources, most likely to fund your project.

Initial contact with the funding source

After a potential funding source is identified a letter of application, phone call, or personal conversation follows to explain the proposed project or need, and to determine if the contact is interested in considering support. Often a conversation with an appropriate official in the grant-giving agency will result in valuable feedback on your chances for success, tips on writing and submitting the proposal, or other agencies which might be interested in funding your project.

When approaching a corporation, if possible, contact the manager of a local or state-based outlet or office for information on the corporate structure, the relationship between the corporation and the local/state branch, and the ability and willingness of the local manager to support your proposal. Ask if you can use the local contact's name in your initial contact with representatives of the corporation. **(Vermilion, 1986)**

This initial contact is most important. Explanation of the proposal should address specific needs, emphasize the importance of the project to the institution, and indicate the ability of the institution to administer the grant to achieve both institutional and funding source goals. It is important to impress upon the potential donor how the project fits with the donor organization's mission and goals.

In many respects, the application for a grant is similar to a job interview, except that it is your school you are promoting, not yourself. As a general rule, avoid asking for support for normal operating expenses, construction or remodeling, or for the maintenance of existing programs. Grant awards to libraries most often fund innovative use of technology or human resources to provide better access to existing collections, or better services to library media center clients.

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Principle #3:

Develop the proposal with the support and assistance of school district administrators; whenever possible, tap the expertise within your school district to assist in preparing the proposal. In the initial contact you must not only sell your idea, but you must convince the donor that it is in their best interest to fund your project.

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Writing the formal proposal

The formal proposal is written and submitted only after the preliminary steps have been taken and the funding source has requested or approved the submission of a proposal. The following elements of the proposal are common to most grant requests. Some RFP's may request other information, or specify a unique format, but the principles are the same.

1) Cover page and preliminary information:

The "cover page" includes the title of the project, the name of the institution applying, the name of the agency to which the request is made, and the date of application. In many cases, the cover page also includes the signatures of persons approving and submitting the proposal. The cover page should be typed on school district (or other appropriate) letterhead. The title of the grant should be short, descriptive and, if possible, aimed at the primary interest of the funding source. Example: *Request to furnish an ergonomically-designed automated office facility to enhance business education programs.* The cover page may also include a brief description of the LMC, the school, and the community, as well as a brief statement of mission.

The "abstract" may occur on the cover page or on a page by itself. Wherever it is placed, it is probably the ***most important element*** of the proposal. Although it occurs at the beginning of the document, the abstract should be the last thing written. It is ***not*** an introduction to the proposal, but a summing-up of the "purpose, importance, and scope of the proposal." **(Boss, 1980, p. 68)**

Some federal grants require compliance with legislation concerning equal opportunity hiring practices, access to facilities for handicapped, and tax-exempt status. The requirement for these forms will be noted in the RFP, and must be signed by appropriate school district personnel.

2) Statement of need:

The statement of need must address a problem that is not resolved by local funding, but is a problem which is important and capable of being solved by the proposed project with outside funding. Needs assessment must fit with institutional goals and objectives, and be clearly focused on well-defined problems.

Research is important here. Try to determine if the problem has been solved, or the idea successfully tried elsewhere. If yes, can the project be replicated; if no, are there alternative solutions to the problem?

3) Goals and objectives:

Provide simple, clearly defined goals and measurable objectives. These are not the same as institutional (school or district) goals and objectives, though they are related. Project goals and objectives are focused on the expected outcome of the project, but must fall within the broader scope of the school district's goals and objectives.

For example, in a school district which does not (and has no desire to) serve the non-academic needs of community residents, it would be inappropriate for the school library media center to set the goal of developing a reference service for community businesses.

Objectives are not plans of action, but are the expected results of the project which, if accomplished, will serve the need or solve the problem set forth in the needs statement. They should be free of library or academic jargon, realistically realized within the time frame of the grant, and be in some way measurable.

For example:

> "The project will train 12 classroom teachers and two administrators in the use of Appleworks"."
>
> "We hope to raise SAT scores of high school seniors by 10%"

4) Methodology, or plan of action:

These are the specific procedures or activities that will be followed in the course of meeting the objectives. This is a very important part of the proposal, and one that will receive close scrutiny by reviewers. It is this part of the proposal that will most likely reveal whether or not your proposal is "do-able". Try to anticipate problems here, and address alternative solutions if possible. Be very specific about the "whos", "hows", and "whens" of the project in its various phases of completion.

Include here any timelines to be met for individual project steps. Example:

1) Purchase computer and software. (April, 1988)
2) Training (May 1-15, 1988)
3) Data entry (May 15, 1988--February, 1989)
4) Project evaluation (March, 1989)

See Appendix C for an example of a more sophisticated timeline, one from which it is easier to see the interrelationships between the various phases of a program.

5) Qualifications:

Include up-to-date résumés for key personnel, and include in a paragraph any previously successful grant projects, or experience in grant administration by any of the project staff.

6) Dissemination

Dissemination of information about your project is important to the funding agency (so they can keep track of progress, as well as reap the benefits of publicity) and others who might be interested in replicating the project.

Dissemination may take many forms: the publication of survey results, research reports, progress reports, newspaper and journal articles about the project. Methods of dissemination should be spelled out in the proposal. If expenditure for publication or mailing of information is likely to be high, an item for dissemination should be included in the budget.

7) Evaluation

State the methods you intend to use to evaluate the project. Evaluation of progress usually occurs over the life of the project, with monthly and/or quarterly reports and a final evaluation near the end of the project. What is evaluated is progress toward stated goals and to what extent objectives have been met within the timelines set. For that reason it is important to have clearly measurable objectives. Methods and procedures should be evaluated as well, noting changes in methods that arose from unforeseen problems, or improvements in procedures made during the course of the project.

8) Budget

The specific elements of the budget are determined by the nature of the project and requirements of the funding source, but will usually include: personnel, facilities and utilities, equipment, supplies, travel, communications (postage and telephone costs), miscellaneous expenses, and indirect costs. Indirect costs are intended to defray any additional expenses to the institution incurred in the course

of the project, such as accounting costs, additional custodial work, and other overhead costs. Many school districts have a set cost for overhead charged to outside projects. This percentage must be factored into the budget based on school district policies and limitations which might be imposed by the funding source. A sample budget will be found in Appendix D.

In some grants, where the school district shares the cost of a project with the funding source, "in-kind contributions" are often allowed. In lieu of providing a cash contribution the school may be allowed to contribute the value of personnel, services, facilities, equipment, or materials applied to the conduct and administration of the project. The degree to which in-kind contributions are required, or allowed, will be stipulated in the RFP. It is easy to overlook indirect costs and in-kind contributions in the preparation of the budget, which may result in higher costs for the institution at best, and may even disqualify an otherwise sound proposal.

Preparing the proposal for submission

After the initial draft of the proposal is complete, it should be reviewed for content and style. If possible, have the draft reviewed by someone who has experience in writing and administering grants.

Richard Boss cites a survey of 100 foundations and government agencies which determined five top priorities in reviewing proposals: **(Boss, 1980, p.73-74)**

- Purpose: the match between interests and priorities of the funding source and the applicant.
- Need: the extent to which the project addresses an important need or problem.
- Accountability: the extent to which the applicant can be expected to successfully implement the project.
- Competence: previous experience and preparation of project staff; past record of successful grant administration.
- Feasibility: personnel, facilities, and adequate funding sought to successfully implement the project.

Nearly as important as the content of the proposal is its composition and appearance. Proposals which are put together by a committee often look that way; that is, there is a good chance that writing styles will vary; purposes will vary, or worse, conflict; and the resulting product will exhibit unevenness in its presentation. For that reason it is best, once the draft has been prepared, for one person (presumably one with better than average writing skills) to draft the final proposal, with input, of course, from the co-authors of the proposal.

Some things to avoid:

- ★ *Jargon; long, rambling sentences or paragraphs; lack of detail where needed; vagueness of any sort.*
- ★ *Missing or misplaced pages; lack of organization in section titles or subtitles; lack of reference to information contained in appendices and attachments.*
- ★ *Misspellings and poor grammar; sloppy or poorly reproduced copies.*
- ★ *Any deviation from procedures or information requested in the RFP, including deadlines, format, compliance, budget items, and signatures.*

Submitting the proposal

Once the final draft of the proposal has been written, and the necessary compliance forms, endorsements, résumés, and appendices have been gathered, the proposal is ready to submit to the funding source.

If there is a deadline for submission, assume that a late proposal will not be accepted. If the proposal is sent close to the deadline, spend the extra money for express mail. In any event, it is always a good idea to use certified mail so that you have a record of the receipt of your proposal.

Do not expect an immediate reply; it may take more than a month for the initial reply to your proposal. Be aware of the fact that many more requests for funding are refused than accepted by a given funding source, but don't be overly dismayed by refusal. Try again, either re-submitting the proposal in an amended form (based on feedback from the original document)

to the same source, or submit the proposal to an alternate funding source located in your research. Always take heed of reasons for rejection and use them to fine-tune your proposal, but don't give up. If your proposal is sound, and addresses significant needs, it is worth the dogged determinism that in the end wins funding.

If you are responding to an RFP, it is best to wait for a confirmation of funding, or an outright refusal, before resubmitting the proposal to another funding source. It is permissible to approach and request funds from a number of potential funding sources, if it is an unsolicited request — not a response to an RFP — but in consideration of the ethics of grantsmanship it is best to inform potential funding sources that requests have been made to multiple sources. As a rule of thumb, if you have been asked to provide a full proposal to a potential donor, wait for confirmation or denial of the request before submitting a full proposal to another source.

Keep a file on all transactions related to the proposal, including notes on phone calls and personal conversations, as well as written communications. Make a list of important contacts, including name, address, telephone number(s), position, and remarks on your conversation or other communication. Even if your request is denied, these contacts may sometimes be useful for future reference and referral.

Summary

It is ironic that while *A Nation At Risk*, a study of the current state of American education conducted by the Department of Education, focuses on information-gathering skills, it hardly mentions school library media centers. Despite the protests of school librarians, it is doubtful that levels of federal funding will approach those of the 1960's, when the threat of under-education seemed more apparent. This trend toward less federal money spent on education coincides with tax reform movements and local initiatives to curtail spending. It all adds up to the fact that school library media centers will face static, if not declining budgets, in the face of demands for teaching high-tech information skills. As it is, school library media centers are hard-pressed to maintain even the traditional instruction and services necessary to support the school curriculum and promote life-long learning.

For the director of the school library media center, alternative funding is not just attractive, but perhaps necessary to improve service and promote library use. The application for grant funding, and the knowledge and expertise to do so, is becoming a requisite skill.

Although it is true that the competition for grant money is intense, the newcomer to grant-writing should not be intimidated. Persistence and adherence to a few basic rules may result in funding for a program which receives national attention, which will make future proposals more attractive. So, the next time you find yourself saying, "if we only had the money to...", go for it!

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APPENDIX B: INFORMATION SOURCES

The following is a selected list of publications in which information on potential funding sources may by found:

Annual Register of Grants Support. Chicago: Marquis, annual.

Catalog of Federal Domestic Assistance. Washington, D.C.: U.S. Government Printing Office, daily.

Dun's Million Dollar Directory. New York: Dun and Bradstreet, annual.

Encyclopedia of Associations. Detroit: Gale Research, annual.

Fortune Double 500 Directory. Trenton, N.J.: Fortune, annual.

Foundation Directory. New York: Foundation Center, annual.

Foundation Grants Index. New York: Foundation Center, annual.

Foundation News. Washington, D.C.: Council on Foundations, bimonthly.

Grantsmanship Center News. Los Angeles: Grantsmanship Center, bimonthly.

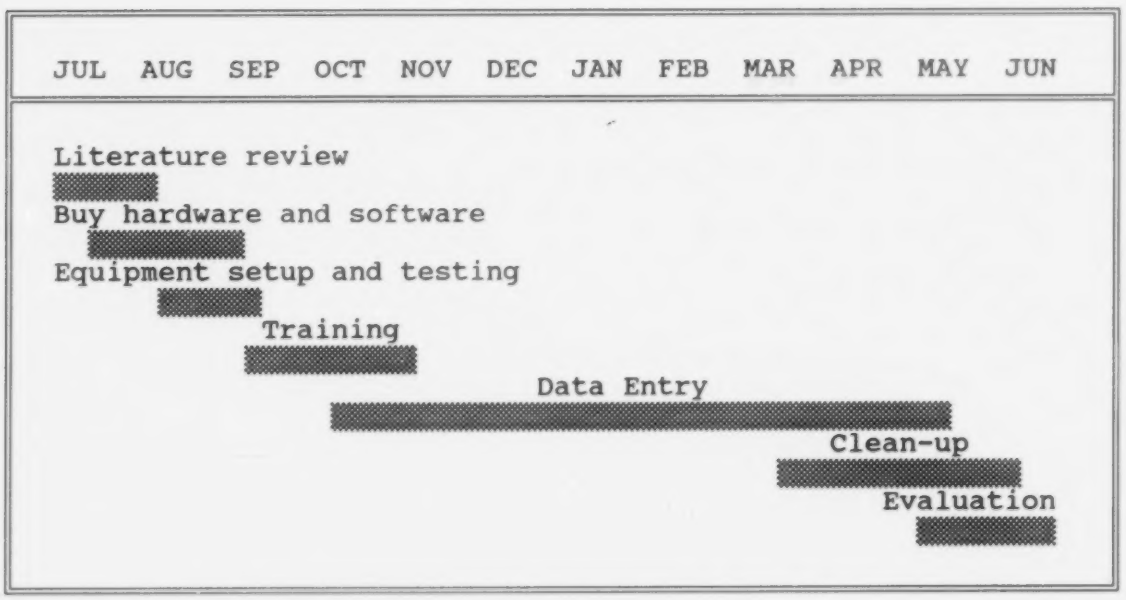
National Data Book. New York: Foundation Center, annual.

Standard and Poor's Register of Corporations, Directors, and Executives. New York: Standard and Poor's, annual.

Thomas Register of American Manufacturers. New York: Thomas, annual.

APPENDIX C: PROJECT MANAGEMENT

Below is a sample of a project management devise that will help both yourself and proposal reviewers to to visualize the phases of a complex project and the relationship of one phase to another. The chart below is only precise to the month, but could easily be made into a weekly chart. It does not take the place of a narrative description, however.



APPENDIX D: SAMPLE BUDGET

The following is a sample budget for a project which makes use of a microcomputer and modem to contact remote databases for answering reference questions.

BUDGET ITEM

Direct Costs:

1.	Personnel #	$ 8,500
2.	Employee benefits @20% of salary	$ 1,700
3.	Equipment ##	$ 2,320
4.	Materials (system documentation)	$ 100
5.	Supplies	$ 150
6.	Telecommunications †	$ 500
7.	Database charges †	$ 1,200
8.	Miscellaneous ###	$ 300
9.	Travel ####	$ 600
Indirect Costs: ‡ (@10% of cost less equipment)		$ 1,305
Total Requested:		$16,675

.5 FTE teacher
See detailed cost breakdown on next page
† Based on average cost of search at $15 X 80 searches
Includes training workshop fee and maintenance costs
To attend two-day training workshop in Portland
‡ Overhead costs incurred during the project, including utilities, administration, use of space, and janitorial service)

(3)	IBM PC/Monitor	$1,200
	Printer	$500
	Modem	$450 (includes telecommunications
	Memory expansion	$120 software)
	Cables	$50
	Total:	$2,320

APPENDIX E: GLOSSARY

Abstract: The element of the proposal which summarizes the purpose, importance and scope of the proposed project.

Accountability: The extent to which one is responsible for careful accounting of funds, other project resources, or for the success of the project as a whole.

Annual report: A corporate or foundation report which includes statements of earnings, income and expenditures, as well as comments on the year's activities and prospects for the future.

Boilerplate: A form for a document, or a section of a document, that is so often used as to become standard. The description of the school and the community, for example.

Challenge grant: Grant offered with the stipulation that the grantee will raise additional funds from another source or sources. Also **Matching grant.**

Contract: A letter of agreement, or formal contract, which spells out the terms of the grant.

Direct costs: Specific and identifiable costs of operation. (See also **Indirect costs**)

Demonstration grant: A grant made to fund an innovative project, with the intention of duplicating the program elsewhere.

Endowment: Funds which are kept permanently by an institution and invested to provide income to support programs or operations.

Foundation: A non-profit organization possessed of capital in the form of an endowment which is invested to insure a continued income, and which is composed of a board or committee which determines how the funds will be dispersed.

Funding cycle: A pattern of announcements, review, and notification of funding that a donor follows throughout the course of a year.

Funding period: The length of time a project is funded by a grant.

In-kind contribution: Contribution of equipment, supplies, staff, or space in the place of a monetary contribution.

Indirect costs: A budget category which covers general administrative costs of a project, including such items as rent, utilities, maintenance, depreciation, and custodial services.

Letter of intent: See **Query letter.**

Letter of support: Written endorsements of a request for funding made by supporting organizations or individuals.

Matching grant: See **Challenge grant.**

Proposal: A written application requesting a grant.

Query letter: A brief letter outlining an organization's intent to apply for grant funding. Also known as a **letter of intent**. Alternatively, a phone call or personal visit may be made to determine if submitting a full proposal is appropriate.

RFP: (Request for Proposal): A public announcement of the availability of funds, specifications, qualifications, and application procedures for a grant. Seen most often in government programs.

Statement of need: The element of the proposal which answers the question: Why is this project important?

Tax exempt status: Status bestowed by IRS on non-profit organizations. Proof of tax-exempt status may be required for some types of grants.

Unrestricted funds: Grants made with terms which allow the grantee to use the funds at its discretion.